Sole Source Request and Justification Form

Purpose

This form must accompany requisitions for the sole source procurement of equipment, software, construction, supplies, or services when the purchase will exceed $50,000. The purpose of this sole source justification is to show that a competitive procurement is not possible because only one product or service can meet the specific need. It is not to be used to circumvent normal purchasing procedure, nor for a price-based justification (your justification cannot be that it is the best price around.) Approval of this request will be at the discretion of the Assistant Purchasing Agent, who may conduct additional research.

Statement

I am aware that Commonwealth of Virginia and County procurement regulations require procurements to be done competitively whenever possible. I am requesting a sole source procurement based on the following criteria. The following statements are complete and accurate, based on my professional judgement and investigations. I also certify that no personal advantage, gain or privilege has (or will) accrue to my immediate family or myself through the purchase from this vendor, nor is a family member employed by or is an officer of this vendor.

Department Head printed name: __Mark Adams_____

Department Head's signature:_____Date: _____

Contact Name __Lyda Kiser_____Phone: _737-8341_____

Requested Vendor: ___eCivis_____

Briefly describe the product/service requested, its function and what it will be used for:
The eCivis organization provides Grants Network T&R, a web-based application that is an add-on to the Grants Network application currently used by Loudoun County. (The service was originally called "Grants Locator" and changed its name in April 2007). This services provides tracking and reporting on grants viewed, researched, applied for and awarded to County departments, as well as the existing service of internally generated content written by trained research analysts. Content is based on research of Federal, State and Foundation grants. In total, Grants Locator covers at least 95% of available competitive grants from Federal and State funders. There are currently 400 local governments who contract with eCivis for over 7,000 local government employees to utilize Grants Locator, including 7 of the 12 largest local governments. Grants Network T&R will be used by Loudoun County staff to research funding opportunities, obtain the forms needed to complete applications, access previously-funded applications, track potential grants and provide reports on what departments are researching, applying for and receiving grant awards. The training component offered by eCivis allows for training on the system to

County staff, additionally contracted days of professional development training and that training participants can receive (at no additional cost) one draft application review by eCivis staff. Finally, eCivis offers a limited number of web-based trainings at no additional charge to Grants Network Clients. This training covers such topics as strategizing match, forming consortiums for grant projects, and completion of essential grant application forms.

Please select the category (or categories) that best describe your sole source requirement. Answer all of the questions pertaining to that category, attach additional pages as needed. Complete only those categories that are applicable.

A. Compatibility with existing equipment, methodology, or training:

   1. With what other material or equipment must this requirement be compatible?

This system is an add-on module to the current eCivis system and incorporates the current Grants Network: Research (formerly Grants Locator) system, in use by the County. The cost of adding this module is $65,000.

   2. What is the approximate dollar value of the existing material or equipment?

$201,487

   3. What are the unique properties that make this the only product compatible with the existing material or equipment?

N/A

   4. Provide any other supporting information, if applicable.

Approximately 100 staff are already registered users of this product. Eighty-three staff have received training on the use of Grants Network:Research/Grants Locator during the Grants Professional Training for Loudoun County VA Government Staff in FY 06 and FY 07. Staff are already familiar with the application, and staff who have participated in the trainings offered have developed relationships with eCivis staff that will assist them in future funding research and applications. Because so many staff are trained to utilize eCivis, it is an effective tool in research and application for funding for County programs.

B. Only known manufacturer of this product:

   1. What investigation has been done to support this claim (i.e., trade shows, Internet searches, professional journals, colleagues, etc.)? Please list sources.

Internet searches and contacts by the procurement officer indicated only two comparable systems. Researched GrantDomain through the Grantsmanship Center and randalocator through Randall Development. Investigation into these systems did not find a system that approximates the eCivis system that is currently in use. Contact was made with staff at Randall Development (Dan Hamilton) to obtain more information and temporary access to the system. The County's Grants Analyst has a subscription to the Grantsmanship Center system, and was able to compare the features of the system to Grants Locator. These 2 services did not meet the combined needs of Loudoun County for grant research and

training. The online application of the Federal Government, grants.gov, does not provide information on any funding sources other than the Federal Government.

2. What other manufacturers did you solicit information from? Please list their names and summarize your findings.

GrantDomain – The Grantsmanship Center, provides grant search of published notifications from public and private sources. The system is geared to non-profit organizations and focuses on those available funding sources, not funding sources available for local government. Information on Commonwealth of Virginia grants is not provided in a timely fashion, with the exception of grants available to non-profits. Training is limited to the curriculums currently in use and geared to non-profit organizations.

Randalocator.com – Randall Development Corp. provides a search engine that provides only information on current funding opportunities and no information on past opportunities. The focus is to solicit clients for their grant/application writing services. Use of the system on a trial basis indication several functions currently available on Grants Locator that did not exist in this system. In addition to the lack of information on past funding opportunities, there is not a function on the system to track grants when applied for nor is there easy access to previously-funded applications. The application has only been in existence for 1 year, so there is no information on how successful other local governments have been in utilizing the program to obtain funding. Finally, this organization does not provide a training component.

Other grant training organizations researched, Research Associates and GrantWriting USA, do not offer the service search engine applications.

3. Does this manufacturer sell directly or through distributors? *Note: If the manufacturer has more than one distributor, a proprietary product may exist and Purchasing may seek competition from these distributors.*

Sells directly

C. Only product that will meet the requirements of the intended use although other like items exist:

1. What other manufacturers did you evaluate? Please identify the manufacturer and the product deficiencies that lead to their disqualification. Attach all vendor quotations to this form.

Researched GrantDomain through the Grantsmanship Center and randalocator through Randall Development as the only other organizations with web applications for funding research.

GrantDomain – The Grantsmanship Center, provides grant search of published notifications from public and private sources. The system is geared to non-profit organizations and focuses on those available funding sources, not funding sources available for local government.

Randalocator.com – Randall Development Corp. provides a search engine that provides only information on current funding opportunities and no information on past opportunities. The focus is to solicit clients for their grant/application writing services.

Other grant training organizations researched, Research Associates and GrantWriting USA, do not offer the service search engine applications.

> 2. If this product is superior to all others, state the reasons why. (Give specific characteristics, capabilities, and properties.)

As the only system structured specifically to cater to the needs of local government entities, eCivis provides a superior product. The organization's Grants Locator system allows searches into past funding opportunities, providing points of contact and information vital to the planning process for funding applications for specific projects. The program also makes available previously funded applications (PFAs) to subscribers for assistance and reference. The system is updated daily. Users are able to receive information on new and updated funding resources based on information specific to their needs. eCivis' training component allows Loudoun County staff to access information and support. Currently, Grants Locator has been certified sole source by the following Virginia local entities: Counties of Albemarle, Caroline, Fairfax and Hanover; Cities of Manassas Park, Norfolk, Richmond and Staunton; Alexandria Sanitation Authority.

> 3. Provide other supporting research to document the need for only this specific manufacturer, if applicable.

The County grants initiative shares information with departments and staff about potential funding sources and researches potential funding for specific projects. Grants Locator is the search engine used almost exclusively for this purpose, since it provides the most relevant information for local government funding. As part of the County's grants initiative, staff are in the first year of a training regimen that is focused on improving the abilities of staff and departments to access grant information, improve application success, and enhance coordination between departments. Subsequent years' training activities will provide basic information to newly-identified staff while building on the knowledge of experienced staff to improve the County's access to grants. Changing the provider of this service at this time would disrupt the efforts of the program, making it difficult to coordinate training between new and experienced staff.

D. Regional Support or Service of Needed Equipment:

> 1. Is this the only known vendor to support and/or service this type of product in this region?

N/A

> 2. If yes, give support of your need for immediate service as the <u>primary</u> requirement for vendor selection when buying new equipment. *(Note: This alone will not qualify as sole*

source if there are other manufacturers that sell and service similar products within this region. Additional support would be required above.)

N/A

E. Service Providers:
   1. Is this the only known vendor that provides maintenance or repair services for existing equipment?

N/A

   2. If another type of service is needed, explain why no other vendor is acceptable.

The eCivis Grants Network system is the only full-service search engine product that is geared to the needs of local government while providing a comprehensive training program to assist local governments in creating a coordinated grant program. As part of the County's Grants Initiative, training is combined with access to information in order to coordinate the grant functions of all County departments, improve the quality of applications and number of awards, and enhance the compliance and grants management functions in County government. No other vendor provides all the needed services (search engine, support, training, review) that are focused exclusively on the needs of local government.

F. What are the consequences of not securing this specific item or service?

Losing the current service would disrupt the County's grant initiative by preventing county-wide staff utilization of the Grants Network system. This would result in a reduction in the number of applications and therefore awards for Loudoun County projects, which would result in a decrease in non-local tax funding for specific programs and projects. Additionally, not continuing the training program through eCivis for County staff would require the beginning of a different curriculum and thereby prevent experienced staff from obtaining training that allows them to progress as applicants and program managers for grants.

G. Provide any additional information not furnished above that supports your specific requirements necessitating a sole source purchase:

As the only vendor with services explicitly focused on local government entities, eCivis has been certified by numerous local governments as sole source. Their services have been utilized by Loudoun County Government employees for 8 years. ECivis provides the only full-service, web-based search engine application with a web-based and on-site training component that provides additional application review support at no additional cost.